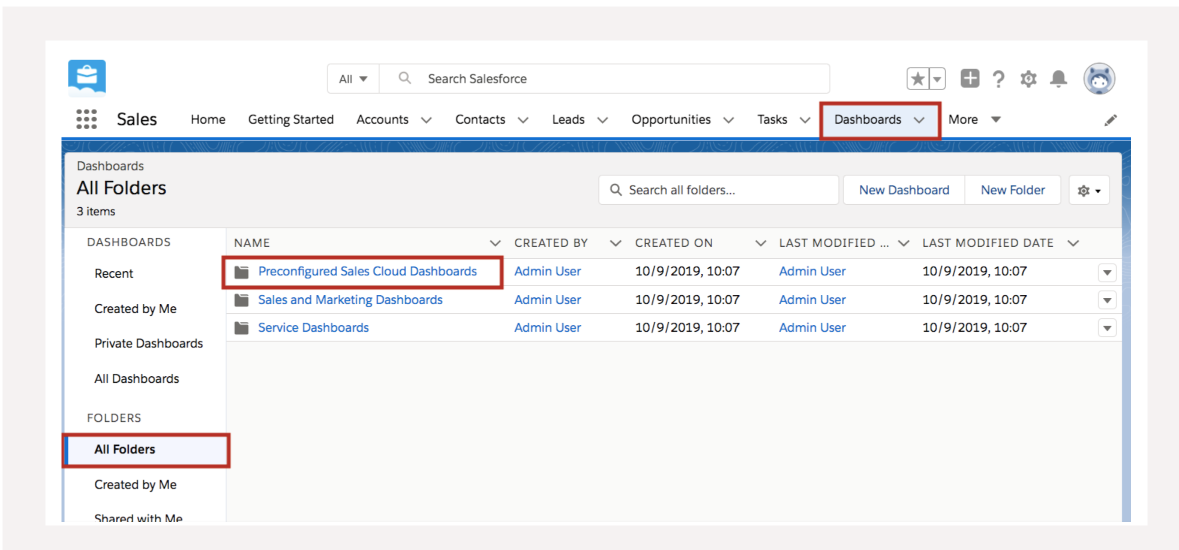
Your Preconfigured Dashboards

These dashboards give your team quick access to actionable insights and reporting.

How to Find Your New Dashboards

Download the preconfigured dashboards and log in to Salesforce.

On your top navigation bar, click on the Dashboards tab. Then navigate to All Folders and open the Preconfigured Sales Cloud Dashboard folder. This folder is where you and your team members can find the preconfigured dashboards.



As You Explore the Dashboards

- Get comfortable with their capabilities
- Consider any customizations you want to add that will enable you to track data valuable to your business
- Read the documentation available on the app download page
- Share the dashboards with stakeholders for feedback

Guide to Preconfigured Dashboards

In addition to this resource, use the guide to Preconfigured Sales Cloud Dashboards to learn more about each dashboard and how it helps your teams track progress.

Revenue Target Adjustments

Your preconfigured dashboards include components that track progress toward specific revenue goals. Adjust the revenue goals you're measuring toward, so that each dashboard provides actionable insights for your business stakeholders and individual sales reps.

Post-Download Data

All reports rely on data to deliver insights. As you explore your preconfigured dashboards, you may notice that some information is missing or incomplete. If that's the case, check in with your sales reps to ensure that their Accounts and Opportunities are complete and up to date. This will help ensure your dashboards are giving you accurate insights.

Dynamic Dashboards

Customers with Enterprise Edition or above can enable dynamic dashboards. This allows you to view dashboard data from the perspective of another user. For example, your manager. Learn more on our Salesforce Help Docs.